

Notes on preparing a tender or briefing document for a new website.

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Introduction

Writing the correct style of tender document is a must to ensure that your organisation gets the right result. We all know about bad purchasing decisions, particularly with public sector purchasing methods. Their tender documents run into the tens' if not hundreds of documents. You will put providers off if your document is too cumbersome and you will increase the risk of repeating yourself or even contradicting yourself, particularly if there is more than one contributor to the document.

Talk about the bare bones of what you need internally then highlight them in a tender document.

The main issue with tenders, which is why many agencies don't often get involved with them, is that they remove the opportunity to understand the client through face to face meetings and due to the nature of tenders, you won't have the time to give everyone the same attention they usually get when providing proposals for website design and development work.

Normally we have meetings on site and spend at least half a day with a client getting to understand them and their issues before deciding what solution would fit them best.

So think twice before using the word tender.

There are seven separate parts of a website design and build process, they are;

- 1) Graphic design – getting the look and feel correct for your visitor.
- 2) Content Management system integration – ensuring the system can handle not just website content but is comprehensive and robust enough to receive continuing development. The big choice here is choosing between licensed or open source. My preference is always Open Source, but I am biased.
- 3) Functionality choices – what does it need to do when made live and what else in the future?
- 4) Content style and layout – must be laid out for the least computer savvy client and the hi tech user of mobile devices.
- 5) Technical support – you will need good technical back up to help with development of the website and any issues that arise when being used by you and your web visitor.
- 6) Website maintenance – all software will need to be updated, this needs to be covered in any tender document.
- 7) Website promotion – often forgotten, this aspect is very important if you want Google to place your website at the top and show it as an 'important' source of information.

Finally, as number 8 – almost always overlooked – is the quality of the hosting provision. Hosting will dictate the speed of the website, the resilience, the availability and security of the website. This is not something to be taken lightly.

Things to be aware of when writing a tender document;

Unnecessary waffle.

You are asking providers to sell you the correct solution. Too much information about you isn't what they can respond to. Keep it simple and to the point. Talk about your audience more than you. Talk about what is should do for you. That's what the graphic designer will want to know – WHO you are aiming at, not what makes YOU tick. I am not saying that your organisation ethos isn't relevant – it is, but in short measure. If you take up too much space explaining the details about your vision etc. that won't help you get the right solution.

High response expectations

Remember that agencies do not (normally) use templates for responses to tenders and – certainly in our case – we write each individually. If you ask for tremendous amounts of information don't be surprised if your responses are low. This is time consuming and unpaid work for your agency and often with a low chance of success, that's why tenders could be problematic to start with for any agency and consequently for you.

Expert responses

Tender writing and bid writing and responding to RFP's is a full time business. There are many providers whose sole job is to do this. Digital agencies re creative and technical people, not bid writers. Do not expect them to be able to provide you with detail that completely fits your written needs.

Must haves

Here are some must have's in a tender document

a) About us

What are organisational goals? What do you do each day? What sort of staff skills do you have and their functions?

b) What makes us different?

Capturing the essence of your 'story' and what makes you unique/special useful to know, but don't go overboard.

c) Your current website

Website url (web address); Approximate number of monthly visits/sessions: (check your Google Analytics if you use it)
Approximate year it was created; Which CMS does it use (if known); How you drive traffic to the website: Facebook/Twitter/Email newsletters/Physical events/Google Adwords

d) What you like / works well on our current site

What aspects or functionality of your current site works well and that you'd like to retain.

e) Issues with the current site – from a staff perspective

E.g. hard for staff to update the site not enough of them are trained, the CMS has a big license fee, the current web agency doesn't provide a good service, it's hard to download data from it etc.

f) Issues with our current site – from a website visitor's perspective

E.g. it's not mobile-friendly, the design is very dated, it's hard to find the right content, it doesn't inspire people to follow calls to action or communicate with you.

g) Rational for a new website

Explain why you are needing a new website now, what has changed (if anything) in your organisation or your 'market' and explain that.

h) Set out your goals

Decide what your goals are for the new website. What does success look like? Have an idea of what return you hope to get from that investment, even if it's hard to quantify it in exact pounds and pence.

i) Website content

Explain how you plan to fill the site with content. Are you planning to bring across content from an existing site or start afresh? What staff resources have you got allocated to creating/refreshing the content for launch? Who will be creating content on an ongoing basis after launch? How often? (Be realistic here!) What are the different types of content you have identified that you will want/need (news, events, blog, project updates, case studies etc.)

j) Images

Do you have a stockpile of good photos to use on the new website? Are there child protection or confidentiality issues that make using photographs a challenge? Remember high quality photos are a must and you will need to hold the copyright (have the picture taken) or buy it before you can use it on your website. Avoid obvious stock by the way.

k) Target audience

Who are the main external stakeholders of the website? Try to be more specific than 'the general public'. This is really important – an agency will need to plan 'user journeys'. They will need a description of the 'normal' visitor and what they will expect from your new website. Also, what do you want people to do when they come to the site.

l) Brand guidelines

Do you need new branding? Or will you use existing. What resources will be available to the new agency? Do you have a set of branding guidelines? Are there colour palettes that you want to use, or is your only 'brand asset' your logo?

m) Website functionality

The more specific you can be here, the more accurately an agency can quote. E.g. don't just say 'Events functionality'. Where are the events held? How often?, do you want people to be able to book tickets online? Are they free or paid? Do you use something like Eventbrite to manage the event? Do you need an events calendar? Is there some content that you only want certain people to see? Can visitors create an account on the site?

n) Requirements

Things like 'mobile-friendly' or 'must integrate a Twitter feed' are taken for granted. But if you only want to use an open-source CMS, or you have other software like a CRM system or third-party websites that you need to work with, then specify them.

o) Budget

Always state a budget, agencies will decide whether to bid or not based on this. Be careful how you phrase this section. Put in a budget range if you'd rather not give your maximum figure. Remember to say whether you're allowing for VAT or not. Also specify what 'extras' you want to be stated in a response i.e. hosting, maintenance, promotion etc.

p) Websites you like

List some websites who have some design or functionality elements you like, in relation to your prospective site. Let us know what it is you like about them. This is subjective and you will never get a group of people to fully agree. Just pick a range but be clear as to why you like them.

q) Websites you don't like

Similarly, list any websites with a design or functionality that you actively don't want your site to draw inspiration from. Again, say why.

r) Ideal Timeline

If there's a date that you'd like the website to be launched by, or any other important milestone dates then state them.

s) Who

Key contacts: details – including contact details – of the key members of your organisation responsible for dealing with the tender; specifically, list those able to answer any queries.

t) Response required

State who to send the response to, and the deadline for doing so. Do not ask for potential design ideas as part of the tender. The best approach is usually something like 'We would like to receive written proposals by (deadline date and time) which outline your approach and your suitability for the project. We will then follow up further with a shortlist of selected agencies.

u) Support

Explain what level you need. Support for the website can mean many things. Hosting should have an SLA (service level agreement). Website fixes should have an expected response time. Say 3 hours for response, during working hours. Don't ask for 24/7 website support, you won't get what you expect (foreign messaging service at best) and frankly if the website goes down in the middle of the night then it hasn't been hosted or built correctly.

v) Testimonials or similar projects.

This could one or one hundred, specify about three that you would be able to contact to verify.

w) Be open to suggestions

Don't be too specific on CMS system or base software to be used. Most agencies can justify their reasons why they use a particular platform as they will have experience of running them.

x) CRM software

Ensure your CRM provider can (and are willing to) work with an external agency to connect with their software.

y) If you are vague...

If you are vague in your request then expect vague answers. Many agencies do not tender because of this. Buying web services is not an established art form, most tenders are either incomprehensible or just plain incorrect. Unfortunately buying a website via tender is not a simple process. Be brief and to the point. Invite questions but answer them quickly.

z) Finally

Think why you are going to tender. Do you need to? Have you already engaged with potential providers who could do the job quite well or have done for others? Are you going to tender to ensure a good spend or to satisfy stakeholders? Neither of these is guaranteed by using a tender process. The agency that doesn't want to tender may be the perfect fit for your organisation, but the fact you are tendering may stop them from joining in.

To conclude

I hope you found the above interesting.

It is by no means an exhaustive list, but hopefully may provide some pointers from the 'other side' of the tendering process.

Just be certain that going to tender is the right way to find your correct web partner, the partner who will be working with you for a long time.

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